

Exports and Reports

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/phdemo/ver9d/exports/list_exports.php?create_phelp_doc=true

Overview

Most of the data exports are simple queries that create “csv” files. Though some do generate reports as PDFs, HTML or Formatted XLS spreadsheets.

CSV files can be loaded into Excel or other spreadsheet programs, as well as into another database, like MSAccess. See Opening a CSV File in Excel for details.

Free office productivity suites are available here:

- 1. <http://www.openoffice.org>
- 2. <http://www.libreoffice.org>

Libreoffice is nearly identical to open office and was started when Oracle took ownership of OpenOffice from Sun. Oracle later gave the code to the Apache foundation. They both work on the same file formats, and are both compatible with Microsoft products.

Parameters

Many of these exports have similar parameters. Some of the common ones are explained here:

- Date Range - Picklist which will automatically set the From & Thru Dates, Dates can also be set manually.
- Assoc Group - Restricts the Export to only include Associate in a particular group, has 2 special options:
 - *All* - All associates will be included, regardless of what groups they may or may not be in.
 - *None* - This restricts the export to only include associates who have not been added to any groups, useful when trying to find associates that still need to be added to associate groups.

List of Exports & Reports

Tech ref: find -L /home/http/phosm/ver9d//exports -name 'contact_list.sql.php'

Associates [\[Help\]](#)

Contact List

Contact List [\[Help\]](#)

Description

List of all associates (optionally including inactive ones), default format (1 row per assoc) with Primary phone, email, and address.

Other Formats (1 or more rows per assoc)

- Phones: All phone numbers for each associate(1 or more rows per assoc)
- Emails: All emails for each associate
- Addresses: All addresses for each associate

Additional Parameters:

- Assoc Group - Restrict to only include associates in a particular group.
- Include Inactive - By default inactive associates are excluded from this export. Select this option to have them included.

Assoc Group

Filter

☐ Include Inactive

Format

XT User List

Tech ref: `find -L /home/http/phosm/ver9d//exports -name 'xt_assoc_users.sql.php'`

XT User List

[\[Help\]](#)

Description

List all of the associates with XT Users. Including Username, Recovery Email, Last Login Date, and the date of last change to password or recovery email. Can be filtered on Assoc Group.

Assoc Group

☐ Include Inactive

Format

Certification

Bulk Transactions

Tech ref: `find -L /home/http/phosm/ver9d//exports -name 'bulk_lot_trans.sql.php'`

Bulk Transactions

[\[Help\]](#)

Description

Export Bulk Lot Transactions

Run For

Single Associate

Associate

Assoc Group

All

Assoc List

Paste a list of Assoc IDs copied from a column in spreadsheet. Only lines beginning with an assoc_id will be applied.
Note: Additional columns may be pasted in along with assoc_ids, but only the Assoc ID will be used in the export.

Date Range

--

From

Thru

Supervisor

All

Submit

Crops

Crops List

Tech ref: find -L /home/http/phosm/ver9d//exports -name 'crop_list.sql.php'

Crops List

[\[Help\]](#)

Description

Exports the entire crops table including Latin Name, Life Cycle and Canada Grade Table information.
Can be restricted by Crop Group ('--' for no restriction, *None* for crops not in any group)

Crop Group

--

☐ Include Inactive

Format

Formatted Spreadsheet

Submit

Varieties List

Tech ref: find -L /home/http/phosm/ver9d//exports -name 'crop_varieties.sql.php'

Varieties List

[\[Help\]](#)

Description

Crops with latin and variety names.
Can be restricted to a single crop (does a partial, case insensitive match) or by Crop Group ('--' for no restriction on group, *None* for crops not in any group)

Crop Group

--

▼

Crop Name

☐ Include Inactive

Format

Formatted Spreadsheet

▼

Submit

Fields

Acres By Crop, Variety, Seed Class

Tech ref: find -L /home/http/phosm/ver9d//exports -name 'acres_by_seed_class.sql.php'

Acres by crop, variety, seed class

[\[Help\]](#)

Description

Sum of acres passed for each variety & seed class for the year.
Grouped by Crop Year. Can be filtered on Crop Year Range. By default range is a single year, but it can be modified to include acreage counts from previous years.

From Crop Year

2024

Thru Crop Year

2024

Submit

Field Inspection Results

Tech ref: find -L /home/http/phosm/ver9d//exports -name 'field_inspection_result.sql.php'

Field Inspection Results

[\[Help\]](#)

Description

Detailed field listing with acres applied for, rejected passed etc. Some of the details included:

- Producer Info (Associate Name, ID & Phone Number)
- Field Detail (Field #, Crop, Variety, GPS, Class, Identity)
- Field Dates (Date entered in PH, Last Update)
- Field Results (Acres passed/rejected/cancelled)

Filters on From & Thru crop years, getting everything between the from & thru years given. Leave either blank for no cut-off.
Optional filter on Field # prefix (use not: to exclude a prefix e.g "not:P-").
Fields where the Inspection has been cancelled are not included, unless “Include Cancelled” option is selected.

From Crop Year

2024

Thru Crop Year

2024

Prefix

☐

Include Cancelled Fields

Submit

Field Inspection Usages

Tech ref: find -L /home/http/phosm/ver9d//exports -name 'field_inspection_components.sql.php'

Field Inspection Usages

[\[Help\]](#)

Description

One Row per field with inspection plan. Each row will list the usages being inspected for.
Filters on Crop Year, if left blank export will default to current crop year.
Optionally filter on a field number prefix.

Crop Year

2024

Prefix

Submit

Supervisor Field Listing - Export

Tech ref: find -L /home/http/phosm/ver9d//exports -name 'field_listing_export.sql.php'

Supervisor Field Listing - Export

[\[Help\]](#)

Description

List of fields by county for all supervisors.
Crop Year is required, if left blank export will default to current crop year.
Optionally filter on Field Prefix and From Date (Fields updated since date specified.)
Columns in Export:
Supervisor / County / Producer ID / Producer Name / Grower Name
Field # / Crop / Variety / Relative Maturity / Previous Usage / Seed Class
Acres: Applied / Passed / Cancelled / Rejected
Status (Cancelled, Rejected, Hold, Passed, Inspected, Apply)
First Production Year / Crop Limitation Years / Foundation Option Date
Planted / Identity / Genetic Origin

Crop Year

Prefix

Since Date *Only fields modified on or after this date*

Supervisor Field Listing - PDF

Tech ref: `find -L /home/http/phosm/ver9d//exports -name 'field_listing_pdf.sql.php'`

Supervisor Field Listing - PDF [\[Help\]](#)

Description

List of fields by county for all supervisors.

The report may take some time to generate, depending on the number of fields found for that Supervisor/Year.

Contains much of the same information as the Export version, but as a formatted PDF file.

Crop Year is required, if left blank export will default to current crop year.

Crop Year

Prefix

Supervisor 

Since Date *Only fields modified on or after this date*

Financial

Account Aging

Tech ref: `find -L /home/http/phosm/ver9d//exports -name 'account_aging.sql.php'`

Account Aging [\[Help\]](#)

Description

Shows the balance aging for each customer and billing type, restricted on charge type.

Account Aging must be calculated so the Account Aging data is up to date. See the date and time below of when it was last calculated and select "yes" in Do Refresh picklist to recalculate if desired.

For more information about the format of the export see the Documentation for the Account Aging screen.

Account aging was last calculated on **10/17/19 11:51 AM**

To recalculate aging before exporting, select "yes" in Do Refresh picklist.

Charge Type 

Do Refresh 

Submit

Account Status - PDF

Tech ref: `find -L /home/http/phosm/ver9d//exports -name 'account_status.inc.php'`

Account Status - PDF

[\[Help\]](#)

Description

Creates a PDF in a format similar to the invoice, but shows all charges/credits/payments for the given date range. The Report can be run for a single customer, or in batch by Associate Group. If the Associate is provided, the Group parameter will be ignored.

To include charges that have not been invoiced, check the Include Uninvoiced box

Note: Running the report for a large group of associates, or for a large date range may take a few minutes to generate.

Run For ▾

☐ Include Inactive

Associate

Assoc Group ▾

Assoc List *Paste a list of Assoc IDs copied from a column in spreadsheet. Only lines beginning with an assoc_id will be applied.
Note: Additional columns may be pasted in along with assoc_ids, but only the Assoc ID will be used in the export.*

Charge Type ▾

Date Range ▾

From

Thru

☐ Include Uninvoiced

☐ Print Cover Page

Submit

Financial Activity Report

Tech ref: `find -L /home/http/phosm/ver9d//exports -name 'financial_activity.inc.php'`

Financial Activity Report

[\[Help\]](#)

Description

Shows various summaries and totals over a given time period.

Date Range -- 

From

Thru

Invoice Detail 2v

Tech ref: `find -L /home/http/phosm/ver9d//exports -name 'invoice_detail.sql.php'`

Invoice Detail 2v [\[Help\]](#)

Description

Shows Invoices & Charges for all invoices of charge type between two dates,, and shows the detail of each invoice (history, balance forward, new charges.)

This report is usually used after closing a billing period. but can also be run for a single associate over a greater amount of time.

Can be restricted to a single assocait (leave blank for all associates.)

If getting invoices for all associates, From & Thru Dates are Required.

If getting a single associate, From & Thru Dates are optional.

Charge Type L 

Date Range -- 

From

Thru

Associate

Invoice Payment Checklist

Tech ref: `find -L /home/http/phosm/ver9d//exports -name 'invoice_pay_checklist.inc.php'charge_typesArray`

Invoice Payment Checklist [\[Help\]](#)

Description

Formatted Export used by PH to track payments against invoices

Date Range -- 

From

Thru

Charge Type *All* 

Format Formatted Spreadsheet 

Submit

Invoice Summary List

Tech ref: `find -L /home/http/phosm/ver9d//exports -name 'invoice_summary.sql.php'charge_typesArray`

Invoice summary list [\[Help\]](#)

Description

Shows the most recent invoice for each associate, if the invoice was not \$0. If the Cutoff Date is provided, the query will get the most recent invoice prior to the date given.


Only active associates will be included. To show invoices from Inactive associates, check the “Include Inactive” box. This export may have some very old invoices at the end.)

Note: The amounts on this export may not match the amount due on the Invoice PDF. This is because the PDF looks for payments made after the invoice date, and applies them against the balance due, so customer don't end up overpaying. See Invoices for more.

Charge Type 

Cutoff Date

☐ Include Inactive

Format 

Submit

Invoices And Service Charges

Tech ref: `find -L /home/http/phosm/ver9d//exports -name 'service_charges_invoices.sql.php'charge_typesArray`

Invoices and Service charges [\[Help\]](#)

Description

Lists service charges within the date range, and invoice the charge was assigned to (if exists).

Can be restricted to a single associate.

Date Range 

From

Thru

Charge Type 

Associate

Submit

Payment List

Tech ref: find -L /home/http/phosm/ver9d//exports -name 'payment_list.sql.php'

Payment List [\[Help\]](#)

Description

This will create an export of all payments between two dates. Export can optionally be restricted for a single associate.
Output can be an unformatted CSV, or a formatted Spreadsheet.

Date Range

--

From

Thru

Associate

Format

Formatted Spreadsheet

Submit

Samples Billed & Unbilled

Tech ref: find -L /home/http/phosm/ver9d//exports -name 'samples_billed_unbilled.sql.php'charge_typesArray

Samples Billed & Unbilled [\[Help\]](#)

Description

Lists all samples that were received or completed within the date range, and all (if any) charges entered for that sample

Date Range

--

From

Thru

Charge Type

All

Lab Status

Billed Status:

unbilled

Submit

Service Fees: Other

Tech ref: find -L /home/http/phosm/ver9d//exports -name 'service_fees_other.sql.php'

Service Fees: Other [\[Help\]](#)

Description

Shows the fees you set up that are the same for all samples.

Fund

All

▼

Submit

Service Fees: By Crop

Tech ref: find -L /home/http/phosm/ver9d//exports -name 'service_fees_by_crop.sql.php'

Service Fees: by crop

[Help]

Description

Shows the fees you set up for testing crops of different types.

Fund

All

▼

Submit

Service Fees: By Crop Group

Tech ref: find -L /home/http/phosm/ver9d//exports -name 'service_fees_by_crop_group.sql.php'

Service Fees: by crop group

[Help]

Description

Shows the fees you set up by crop group

Fund

All

▼

Submit

Yearly Revenue By Associate

Tech ref: find -L /home/http/phosm/ver9d//exports -name 'associate_revenue.inc.php'

Yearly Revenue by Associate

[Help]

Description

This export shows the total billed to each customer for each year. One row per customer, each year a separate column.

Charge Type

L

▼

Submit

Foundation

Approved And Registered Grower Status

Tech ref: find -L /home/http/phosm/ver9d//exports -name 'mcia_grower_histories.inc.php'

Approved and Registered Grower Status

[Help]

Description

Export of associates grower status for a given year
Member Histories last updated on **Never**

Assoc Group

All

▼

Year

2024

Do Refresh

No

▼

Submit

Inventory Seed Lots

Tech ref: find -L /home/http/phosm/ver9d//exports -name 'mcia_foundation_inventory_lots.inc.php'

Inventory Seed Lots [\[Help\]](#)

Description

Exports a List of all Seed Lots where Class = Foundation and Is Inventory = Y

☐ Exclude Empty Lots

Submit

Seed Order Summary

Tech ref: find -L /home/http/phosm/ver9d//exports -name 'mcia_foundation_seed_orders.inc.php'

Seed Order Summary [\[Help\]](#)

Description

Exports a List of all Seed Orders by delivery year

Delivery Year

2020

Submit

Organics

Process Plan Detail

Tech ref: find -L /home/http/phosm/ver9d//exports -name 'process_plan_detail.inc.php'

Process Plan Detail [\[Help\]](#)

Description

Export of process plan steps. Filters include: Date Range (uses expected date) Plan Year, Step Status, Who, Step and Label. Step and Label filters will do partial, case-insensitive matches so filtering on label "a" will bring back all "A.#.##" steps
Can be output as a unformatted datasheet, or a formatted spreadsheet.

Date Range

--

▼

From

Thru

Plan Year

2024

Label

Step

Who

Step Status

▼

Format

Formatted Spreadsheet

▼

Submit

Process Plans

Tech ref: find -L /home/http/phosm/ver9d//exports -name 'process_plans.inc.php'

Process Plans

[\[Help\]](#)

Description

Export of process plans. Filters include: Associate, Plan Year, Type, Status, Client Rep and Inspector
Can be output as a unformatted datasheet, or a formatted spreadsheet.

Associate

Plan Year

2024

Plan Type

▼

Plan Status

▼

Client Rep.

▼

Inspector:

Format

Formatted Spreadsheet

▼

Submit

Seed Testing

Crop Testing Rules

Tech ref: find -L /home/http/phosm/ver9d//exports -name 'crop_testing_rules.sql.php'

Crop Testing Rules

[\[Help\]](#)

Description

Shows the rules you have set up for testing crops of different types.

Rule Name

Defined Remarks

Tech ref: `find -L /home/http/phosm/ver9d//exports -name 'defined_remarks.sql.php'`

Defined Remarks [\[Help\]](#)

Description

Pre defined remarks for usage on reports.

Germination Schedule

Tech ref: `find -L /home/http/phosm/ver9d//exports -name 'germ_schedule.inc.php'`

Germination Schedule [\[Help\]](#)

Description

For the Date Given, Report shows the viability tests that need to be taken out of prechill, or that need their first or final counts.

Date Range 

From

Thru

Lab Activity

Tech ref: `find -L /home/http/phosm/ver9d//exports -name 'lab_activity.sql.php'`

Lab Activity [\[Help\]](#)

Description

Shows various summaries and totals over a given time period.

Date Range 

From

Thru

Lab Report Summary

Tech ref: find -L /home/http/phosm/ver9d//exports -name 'lab_report_summary.sql.php'

Lab Report Summary [\[Help\]](#)

Description

List samples that were received, completed, printed, or emailed within the date range.

Date Range 

From

Thru

PH Billed Support

Tech ref: find -L /home/http/phosm/ver9d//exports -name 'ph-billed-support.sql.php'

PH Billed Support [\[Help\]](#)

Description

These are the tests we counted to determine you PH usage fee.

Date Range 

From

Thru

Sample Context

Tech ref: find -L /home/http/phosm/ver9d//exports -name 'sample_context.sql.php'

Sample Context [\[Help\]](#)

Description

Exports the sample in process during the specified date range.

One row per sample, each row shows the Lab #, Crop/Variety, Tests requested and the Dates it was received, completed, and released.

Date Range 

From

Thru

Sample Detail

Tech ref: find -L /home/http/phosm/ver9d//exports -name 'sample_detail.sql.php'

Sample Detail

[\[Help\]](#)

Description

Extended info about samples that were created within a date range.
Contains: Seel Id, Sam Id, Seed Class, Lot Number, Owner Id, Lot Owner, Owner Lot Name, Lab Number, Name, Analyst, Received Date, Status, Inspection Number, Labelled Lot No, Growers, Fields, Analysis Print Date, Component, Test Name, Germination Purity Date, Purity, Other Crop, Other Weed, Inert Hard, Dormant, Viable, Pls, Germ Start Date, Germ Date, Tz Test

Date Range

--

▼

From

Thru

Submit

Sample Results Extended

Tech ref: find -L /home/http/phosm/ver9d//exports -name 'sample_results_extended_2v.sql.php'

Sample Results Extended

[\[Help\]](#)

Description

Summary result of samples.
Contains one row per sample, with Percentage results for Purity (including other crops, weeds & inert matter), TZ, Germination (including hard, dormant, and viable.)

The date restriction uses the analysis print date.

Date Range

--

▼

From

Thru

Submit

Sample Test Detail

Tech ref: find -L /home/http/phosm/ver9d//exports -name 'test_results.sql.php'

Sample test detail

[\[Help\]](#)

Description

This export returns all of the test detail rows for any samples received within the date range.
The list of samples returned can be restricted to only include samples where a result exists for given the component Component filter supports partial

matches ('%grass' matches bluegrass and wheatgrass) and checks both crops & contaminants

NOTICE - This export can be very large may take a long time to run. It may fail if run for too big of a date range.

Date Range -- 

From

Thru

Component

Seed Regulatory Samples

Tech ref: find -L /home/http/phosm/ver9d//exports -name 'seed_reg_samples.sql.php'

Seed Regulatory Samples [\[Help\]](#)

Description

Export of Regulatory samples between two dates.

Date Range -- 

From

Thru

Ph.Admin

Export Style Variables

Tech ref: find -L /home/http/phosm/ver9d//exports -name 'export_style_variables.sql.php'

Export Style Variables [\[Help\]](#)

Description

Export Style Variables

Export Table And Columns Details

Tech ref: find -L /home/http/phosm/ver9d//exports -name 'export_table_columns.sql.php'

Export Table and Columns Details [\[Help\]](#)

Description

Export Table and Column definitions

Submit

Ph.Dev

Export Tagged And Sold Seed Details

Tech ref: find -L /home/http/phosm/ver9d//exports -name 'tagged_and_sold.sql.php'

Export Tagged And Sold Seed Details

[Help](#)

Description

Crop Year

Submit